



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Voluntary Report - public distribution

Date: 4/17/2002

GAIN Report #BE2017

Belgium-Luxembourg

Fishery Products

The Belgian Seafood Market

2002

Approved by:

David W. Cottrell

U.S. Embassy

Prepared by:

Yvan Polet

Report Highlights:

In 2000, Belgian seafood prices increased and consumption decreased 1 percent.

Some EU seafood products were found to contain high levels of dioxin, leaving consumers with concerns over the safety of EU seafood.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
The Hague [NL], BE

Belgian Fisheries

In 2001, the 130 vessels of the Belgian fishing fleet caught over 18,000 tons of seafood, worth about \$61 million. This compares to 17,580 metric tons and a value of \$57.6 million in 2000. In the longer term, catch levels are expected to decrease due to EU fish quota reductions. The Belgian catch is landed in the ports of Zeebrugge, Oostende and Nieuwpoort. Zeebrugge is the most important port, with 77 percent of landings, and Oostende has 20 percent.

The major species caught were:

Table 1:

| Species (in MT) | 2000 | 2001 |
|----------------------|---------------|---------------|
| -sole | 3,488 | 3,724 |
| -plaice | 4,938 | 4,725 |
| -cod | 1,697 | 1,634 |
| -ray | 1,135 | 1,374 |
| -lemon sole | 640 | 724 |
| -whiting | 434 | 444 |
| -haddock | 256 | 433 |
| -turbot | 284 | 272 |
| -monkfish | 245 | 303 |
| -dogfish | 382 | 367 |
| Total Fish | 16,112 | 16,574 |
| -shrimps | 325 | 392 |
| -crayfish | 194 | 205 |
| Total Crustacean | 649 | 709 |
| -scallop | 255 | 284 |
| -inkfish | 461 | 371 |
| Total Mollusks | 810 | 769 |
| Total Seafood | 17,580 | 18,053 |

Source: Union of Flemish Fish Auctions

The Belgian Seafood Market

Table 2:

| Sea Fish in MT | 1999 | 2000 |
|-----------------------|---------|---------|
| fishing | 16,483 | 15,010 |
| +import | 116,336 | 100,587 |
| -export | 40,142 | 35,521 |
| market | 92,677 | 80,076 |

| Freshwater fish in MT | 1999 | 2000 |
|------------------------------|--------|--------|
| fishing | 1,500 | 1,500 |
| +import | 36,292 | 57,983 |
| -export | 12,110 | 25,820 |
| market | 25,682 | 33,663 |

| Crustacean and Mollusks in MT | 1999 | 2000 |
|--------------------------------------|--------|--------|
| fishing | 1,582 | 1,459 |
| +import | 82,178 | 80,315 |
| -export | 40,648 | 35,702 |
| market | 43,112 | 46,072 |

| Total Seafood in MT | 1999 | 2000 |
|----------------------------|---------|---------|
| fishing | 19,565 | 17,969 |
| +import | 234,806 | 238,885 |
| -export | 92,900 | 97,043 |
| market | 161,471 | 159,811 |

Source: Belgian Ministry of Agriculture - Agricultural Statistics 2000

Belgian Seafood Consumption

In 2000, the average Belgian household spent \$3,106 on food (11.9 percent of total household expenses), compared to \$2,946 in 1999. Belgian food expenses per household are summarized in Table 3.

Table 3:

| Expenses in US\$ | 2000 | 1999 |
|-------------------------|-------|-------|
| Total Food | 3,106 | 2,946 |
| Meat | 838 | 854 |
| Seafood: | 186 | 174 |
| -fresh seafood | 110 | 100 |
| -frozen | 22 | 24 |
| -canned | 16 | 15 |
| -smoked or dried | 15 | 14 |
| -convenience | 23 | 21 |

Source: Belgian National Institute of Statistics

In 1999, seafood consumption rose 6.8 percent because of the dioxin crisis. Meat sales dropped, shellfish sales increased and insufficient supplies of fish resulted in soaring prices. In 2000, Belgian households spent 6.9 percent more for seafood, compared to 1999, while seafood consumption decreased 1.1 percent. In 2001, we estimate that climbing prices have further reduced fish consumption and, despite new animal disease outbreaks, meat consumption has reportedly recovered from previous levels.

Food safety

After the 1999 dioxin crisis, Belgian authorities launched a new food safety monitoring program (see GAIN report BE1045: The Belgian Meat Traceability and Safety System). First designed to quickly detect contaminants in animal feed, it now also monitors fresh and processed food and imported products, including seafood. The program has detected dioxins and PCBs in fishmeal, leading to less fishmeal used in animal feed. Fish products have also been reportedly contaminated with dioxin. The levels depend widely on species, catch area and time of the year. Press reports on these test results have led to growing consumer concerns about the safety of EU seafood. This contrasts to growing consumer confidence about meat because of stricter controls and traceability in meat production.

Opportunities

U.S. exporters may be able to take advantage of consumer concerns over EU seafood products, especially if they can demonstrate superior food safety aspects of their products. Higher prices in the EU, due to short supplies and lower catch quotas, may also help US products be a bit more price competitive.